

# **All dressed up and no place to go: Addressing the under-classification of librarians and creating opportunities for development in an academic library**

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## **ABSTRACT**

The issue of workforce planning is becoming increasingly pertinent across the Australian library and information industry. This is particularly true in the state of Tasmania, which, with a small population and markedly ageing workforce, is likely to be especially impacted by the effects of generational change and staff retention and recruitment in the near future.

Recognising this problem, the University of Tasmania (UTAS) Library initiated a comprehensive workforce planning project over 2005 – 2007 to identify and address the key issues impacting on the effective retention and development of new and experienced staff. Two of the key issues identified in this process were:

1. the chronic under-classification of experienced librarians, and
2. the lack of opportunities for new librarians to enter and develop within the profession.

In order to address these issues the systematic reorganization of the Library's strategic service units, position descriptions and development practices was set in motion. This was, however, only the beginning; the UTAS Library still had no comprehensive orientation program for new librarians, and also lacked an in-house structure for articulation as the capacity and experience of these librarians grew. In 2007 the *Liaison Librarian A Developmental Framework* was developed, in close reference to the theories of the learning organization and workplace learning, to provide a structure for formal and informal learning and support in professional development and articulation.

This paper sets out to ground the UTAS Library workforce planning process and subsequent Development Framework system in their practical and theoretical contexts, while the accompanying presentation will provide a personal narrative of how the changes did (and didn't) work for a Generation Y new librarian when the Framework was first put into action in early 2007.

## BODY OF PAPER

### Introduction

This is a paper about workforce planning.

*But it is not a paper about how to plan your workforce.*

This is a paper about staff restructuring.

*But it is not a paper about how to restructure staff.*

This is a paper about professional development and promotion.

*But it is not a paper about how to promote or get promoted.*

This paper instead explores the experience of the University of Tasmania (UTAS) Library as it sought to prepare itself for the imminent wave of retirement that the organization's markedly ageing workforce foreshadowed. Using a workforce planning framework to identify the gaps in the Library's projected needs and actual capacity, the Library discovered several areas of critical need; namely the barriers to staff retention created by the chronic under-classification of experienced librarians, and the need to recruit and train new librarians to balance the ageing of the current workforce. This paper describes the journey of the UTAS Library as it addressed these challenges, and as it transformed its staffing structure to reflect and accommodate the needs of a multi-generational workforce.

### **This is not a paper about workforce planning: The University of Tasmania Workforce Planning Project**

Librarianship is widely acknowledged as an aged and increasingly ageing profession. In Australia this is certainly true; in the state of Tasmania, especially so (Hallam 2008). With a small population (nearly 500,000 of the Australian population of 21.7 million) and markedly ageing workforce the predicted retirement wave is likely to have a significant impact in the Tasmanian library and information service (LIS) sector. Although the current economic climate may buy some time in terms of the onset of the 'grey exodus,' the fact is that the population *is* getting older and LIS workers are getting even older; global financial crisis or not people will soon start leaving the LIS workforce in large numbers and there may not be anyone to fill the gaps that are left behind.

Growing recognition of this impending reality has seen workforce planning begin to emerge in the literature as one of the key tools to ensuring continuity and regeneration in library workforces in a time of intense demographic change. Sometimes termed 'succession planning' the process aims to facilitate the smooth management of short and long term transitions as people enter and leave the workplace, and as the needs of the workplace change. To this end, the basic elements of the process are:

1. *'stocktaking'* the current workforce
2. *forecasting* future needs
3. *planning* to meet these needs
4. *implementing* measures to address these needs

(Gorman and Cornish 1995).

The University of Tasmania Library, recognizing the value of this process, embarked upon a workforce planning project over 2005-2006.

'Stocktaking' the current workforce revealed, amongst other things, that:

- 64.5% of all positions were fulltime, and 90.4% were continuing, rather than fixed-term
- The overall age profile of the Library workforce was comparable with the national average for the LIS sector, with 60% of staff over 45 years of age
- However 34.3% of professional staff were over 55 years of age – double the national average for librarians
- Gender was slightly more balanced than the national average, with 73.4% of staff female and 26.6% male, however male staff members were more likely to hold a senior position
- Staff turnover increased from 12.6% to 19.1% in 2005 and was likely to continue to increase
- 70% of terminations were among staff in positions classified as entry level
- 67-90% of staff across all positions exceeded the minimum requirements for their classification level

(University of Tasmania Library 2006, pp.11-25)

Having detailed the demographic profile of the current Library workforce attention could then be turned to identifying and assessing the future needs of the Library, and the capacity of the current workforce to meet them. This process of forecasting was initially carried out through extensive consultation with a variety of stakeholders who articulated the future directions of the University of Tasmania generally, and of the UTAS Library specifically. A gap analysis was then undertaken to identify those areas where needs were not currently able to be met, and to outline the agenda for addressing this disparity. A range of forecasted needs and potential gaps were identified through this process under the broad areas of *qualifications, career development, attributes of staff, Library structure and staffing, demographic profile*, and *modes of employment* (University of Tasmania Library 2006). For the purposes of this paper I will be examining those items detailed under *career development, Library structure and staffing* and *demographic profile* that specifically related to the Library's liaison (or 'subject') librarians.

**This is not a paper about staff restructuring:  
'The restructure we had to have'**

The particular areas of forecasted need identified by gap analysis were:

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1. the need for greater mobility across positions for professional development opportunities (*moderate gap*)
2. the need to facilitate opportunities for career progression (*moderate gap*)
3. the need to recognize the changed role and requirements of liaison (*critical gap*)
4. the need to recruit and train new staff to address projected losses through retirement (*critical gap*)

(University of Tasmania Library 2006, pp.82-111)

With moderate and critical gaps identified between the Library's current capacity to meet these needs and the capacity that would actually be required to do so, the structures and practices shaping the liaison librarian workforce needed to undergo significant transformation.

First, the need for greater mobility across positions. Key to this gap was the unintentionally divergent development of location-specific position descriptions. Spread over two campuses and six separate branches, liaison librarians worked in both local branch-based and cross-campus School-based liaison teams. In the absence of a centrally-defined position framework the different branches of the Library had independently developed a range of position descriptions encompassing a variety of roles and activities that were then all grouped together under the title 'liaison librarian'. This resulted not only in a fragmented and strategically scatter-brained liaison service, it also served to entrench a static liaison structure in which little movement or flexibility within teams and across branches was possible.

This was compounded by the structure of these branch and School teams. The teams were comprised of team leaders, classified as experienced or senior librarians at Level B, and the remaining team members, all classified as entry-level, Level A. While there is nothing essentially wrong with this model of team leadership, it was the dichotomous classification of team members as either senior or entry-level that was problematic. As the demographic statistics outlined earlier showed, the vast majority of librarians classified at Level A exceeded the minimum requirements of this level, and indeed most were far more experienced than the entry-level classification would imply. Interviews with staff at entry level positions revealed that while they would like to progress their careers within UTAS, they could see few options for doing so (University of Tasmania Library 2006, p.41). This observation was reflected in the fact that 70% of all terminating staff were from positions classified as entry-level (University of Tasmania Library 2006, p.18), while a later parity analysis with equivalent institutions revealed that liaison librarians at UTAS were classified one to two levels below the industry norm (University of Tasmania Library 2006, p.69). Furthermore, the existing classification structure was not only unrepresentative of the actual skills and experience of the Level A liaison librarians in their *current* roles, it was even less appropriate in the context of the ongoing strategic re-alignment of liaison away from a service-based role and towards that of highly skilled co-educators and information specialists.

Clearly, the situation was unsustainable. The measures necessary for overcoming these gaps, while significant, were in fact fairly straightforward. Following a period of consultation with the different liaison teams, a shared vision of what liaison entailed was articulated, documented, and mapped over a progressive framework of generic position descriptions that then replaced the patchwork of location-based descriptions which had evolved in the different branches. Of course, the nature of liaison work is such that the specific needs of the different Schools and Faculties make different demands of their liaison librarians; this is part of the reason the location-based position descriptions evolved in the first place. The new, generic position descriptions provided a common structure for the broad responsibilities and goals of the role; the necessary adaptations to the unique circumstances faced by each librarian would thus be wrought not through the definition of these responsibilities, but in how they were enacted. The implementation of the new position descriptions was also coupled with the restructuring of School-based teams into a Faculty team model. This shift was designed to enable greater cross-campus strategic planning, and mirrored a broader shift in organization by UTAS as an institution (Dearden 2008).

This, of course, only solved half the problem. The next step was the systematic upwards reclassification of all entry-level liaison librarians into the more representative senior level. This flattening of the previously hierarchical branch and school teams led to further structural change; the newly equalized teams would now function as self-managed teams in which leadership was no longer based on classification level but enacted through the development of specialist skills and knowledge.

While these restructuring measures bridged several of the significant gaps, they actually had the potential to create an even larger problem for the fourth and final gap to be discussed: the critical need to recruit and train new staff.

### **This is not a paper about professional development: The Liaison Librarian A Developmental Framework**

The wholesale Level B re-classification of the 'entry-level' librarians was an important and necessary step in redefining the UTAS Library workforce. It did, however, produce the unwanted side-effect of effectively locking new librarians out of opportunities to gain experience in liaison by removing the traditional entry-level pathway. Addressing this problem was fairly simple; as liaison librarians left or retired from their positions the openings would once again be advertised at Level A. This would be fine, for a time, but would soon have seen history repeating; without a system in place to formally recognize skill development from Level A to B this practice would eventually lead to experienced librarians languishing in entry-level positions once again.

Over the course of 2006-2007 the *Liaison Librarian A Developmental Framework* (for the sake of clarity to be hereafter referred to as the Development Framework, or simply the Framework) was developed and implemented to provide new librarians with a detailed structure for skill and knowledge development; defining a set of core capabilities

and performance criteria the Framework provided a pathway for professional recognition and promotion from level A to B. Born of the very real practical needs of the Library, the Development Framework was also developed within the wider context of UTAS Library's long-term aim to better orient itself as a learning organisation. Senge, one of the early proponents of this field, defines the learning organisation as "continually expanding its capacity to create its future" (1990, p.14); Pedler, Burgoyne and Boydell expand upon this slightly to "an organisation that facilitates the learning of all its members and consciously transforms itself and its workers" (1997, p.3). Taking these definitions, workforce planning can be understood as an integral process of organisational learning, facilitating the conscious transformation of the workforce at both macro and micro levels by allowing the organisation to plan for change, rather than simply reacting to it.

Designing the Framework, it was Pedler et al.'s seventh characteristic of the learning organisation, "Enabling Structures" (1997 p. 16), that provided the conceptual model for facilitating workplace learning. Enabling structures are defined as any physical, cultural, procedural or structural feature of an organisation that provides opportunities for development both on an individual and organisational level (Pedler et al. 1997, pp.122-124). Of Pedler et al.'s discussion of enabling structures it is the concept of scaffolding that is particularly being applied here. As the analogy implies, scaffolded enabling structures act as temporary supports for the development of permanent skills; once these skills are stable and free-standing the temporary support can be removed (Pedler et al. 1997, pp.122-124). The Development Framework was designed to act as one such support.

Let us now examine a segment of the Framework itself:

Capability	Performance Criteria (add additional criteria as required)	Learning Activities (add appropriate learning activities as required)	Types of Evidence (add types of evidence as appropriate)
Reviewing and improving information literacy programs and developing new programs to meet changing client needs	<p><i>LLA</i></p> <p>Investigates effectiveness of teaching practice through mechanisms such as peer, student and lecturer feedback</p> <p>Adapts approaches and recommends changes according to experience, participant feedback and in consultation with supervisor/mentor/peers</p> <p><i>LLB</i></p> <p>Researches effectiveness of programs</p> <p>Implements changes according to theory and review of practice.</p>	Gather feedback and reflect on practice	Eg. Teaching portfolio showing evidence of improvement and effectiveness

Fig. 1. Segment of Liaison Librarian A Developmental Framework (University of Tasmania, 2007).

The first level of the Framework, *Capability*, outlines the broad requirements of liaison librarians; the second, *Performance Criteria* delineates the levels of accountability and complexity within these capabilities at levels A and B. These were extrapolated from the new generic position descriptions, and further refined as the Framework was explored in

practice. It was agreed that the Framework must function as a working document, in order to accommodate the evolving context of the liaison environment.

The *Learning Activities* column provides space for structured and non-structured activities to facilitate learning; you can see however that in the segment above, the column is nearly empty. The intention here was to allow for the necessary flexibility and open-ended learning required by the fluid nature of the liaison role, rather than prescribing a list of rigid requirements. The same approach was taken in the *Types of Evidence* column, where suggestions for potential means of demonstrating developing knowledge, skills and capabilities can be made within the librarian's unique liaison context.

As skills and knowledge developed progress was charted against each capability:

Capability	Performance Criteria (add additional criteria as required)	Learning Activities (add appropriate learning activities as required)	Types of Evidence (add types of evidence as appropriate)	Discussion (Librarian)	Comments (Supervisor)
Reviewing and improving information literacy programs and developing new programs to meet changing client needs	<p><i>LLA</i></p> <p>Investigates effectiveness of teaching practice through mechanisms such as peer, student and lecturer feedback</p> <p>Adapts approaches and recommends changes according to experience, participant feedback and in consultation with supervisor/mentor/peers</p> <p><i>LLB</i></p> <p>Researches effectiveness of programs</p> <p>Implements changes according to theory and review of practice.</p>	Gather feedback and reflect on practice	Eg. Teaching portfolio showing evidence of improvement and effectiveness	<p>Log of all classes kept, including details of successful/unsuccessful strategies. Feedback and learning plans also provided (see Appendix)</p> <p>Continue to incorporate feedback and reflection in new and existing programs. Eg. verbal, visual, kinesthetic elements, greater emphasis on Boolean.</p> <p>Ongoing.</p> <p>Strive to apply the principles of effective teaching in the design and delivery of classes, as learned through my Grad Dip, and through subsequent reading and observation (see learning plans etc in Appendix).</p>	<p>Yes</p> <p>Emphasizes librarian's strengths in the area of Information Literacy</p> <p>Yes</p>

Fig. 2. Segment of Liaison Librarian A Developmental Framework (University of Tasmania, 2007), including descriptions of evidence, and supervisor comments.

Progress in each capability area was discussed and reviewed in regular meetings between the liaison librarian and their supervisor. In some cases documentary evidence was provided (eg. learning plans, written feedback and other records), while in others evidence was assessed in terms of conceptual understanding, or practical demonstration of proficiency. Billett emphasizes the particular importance of guides, or mentors, in the success of workplace learning programs (2001 p. 159); these discussions served as a platform for guided learning to occur. Once development in each capability area had

been discussed, documented and signed off, the now not-so-new librarian's increased capacity would be reflected through a change in classification, moving from entry-level A to the experienced B level.

The Liaison Librarian A Developmental Framework was not intended as a deliberate strategy to attract Generation Y librarians (ie. those born between 1978 and 1994 (Sheahan 2005)) in particular. As it has thus far transpired however, only Generation Y librarians have taken or are taking part. Since the liaison restructure and the introduction of the Framework took place, 4 out of 17 liaison positions – nearly one quarter – are now filled by Generation Y new librarians. This is quite significant, considering that nationally the cohort only makes up about 3% of all librarians (Hallam 2008), and that at the time of the workforce plan *no* librarians at UTAS belonged to this age group at all (University of Tasmania Library 2006, p. 14). While no direct causal link can be made between the measures outlined above and the demographic shift, the Framework process of development and promotion does indeed satisfy many of the preferences and characteristics of Generation Y employees, for example:

- *Ambition* – supports the desire for development, making the pathway for career progression explicit and accessible
  - *Individuality* – shows where you could go and how to get there, but with room to do it your way; it is a customisable, rather than prescriptive process
  - *Recognition and reward* – not a program of development just for the sake of development, but one in which real achievement is supported and recognized.
- (Sheahan 2005)

Of course, these desires are by no means unique to Generation Y; nor is the experience of being a new librarian. In Tasmania only 18% of new librarians are entering their first career; the vast majority are entering the profession as a career change or after a break from the workforce (Hallam 2008). While no 'older' new librarians have yet undertaken the Framework process, there is no reason to believe that it could not also facilitate their successful development and promotion.

### **This was a paper about the sum experience of these parts**

While the processes of planning and change were by no means difficulty-free, the process has been largely successful in increasing the capacity of UTAS Library to meet its oncoming demographic challenges as a responsive, reflective, and above all, learning organization.

Through the systematic investigation of its current situation and the assessment of where its future was leading, UTAS Library was able to move from a fragmented, static structure in which career progression for librarians was virtually non-existent, to a system in which staff are able to move across and within teams uninhibited by an artificially isolating position structure, and where skills and knowledge are recognized, valued and developed across all levels of experience. No longer are enthusiastic and talented

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librarians 'all dressed up with no place to go'; the introduction of the Development Framework system of recognition and promotion means new librarians now have the opportunity to shine.

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